IT Strategic Planning: Making Your IT Organization Efficient and Effective

Jeffrey Locketz, CPA, CGMA, CITP, CISA, CISM, CGEIT, CRISC, CBCP, CRMA, CCISO
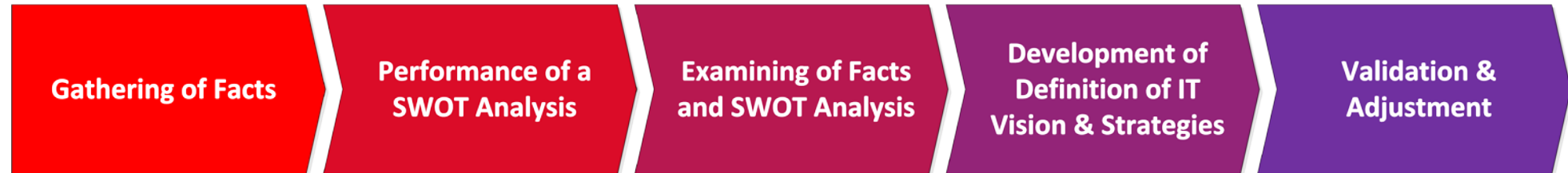ICMA Conference Presenter

#ICMA2018

ICMA conference

BALTIMORE 2018
104th Annual Conference
SEPTEMBER 23–26

How can an IT Strategic Plan Assist with Making Your Organization Efficient and Effective

- Good IT budgeting is good financial planning.
- Aligns the IT budget with the organization's overall mission and strategy,
- Provides a Run-Grow-Transform IT investment analysis
  - Run – keeps the organization operating.
  - Grow – keeps the organization current adding new capabilities or improve existing ones.
  - Transform – provides the capability of planning and researching better and newer ways to improve governmental operations
- Assesses the financial impacts of the IT budget.
- A multiyear run-grow-transform and reserve analysis.

ICMA

The IT Strategic Planning Process

Gathering of Facts

Performance of a SWOT Analysis

Examining of Facts and SWOT Analysis

Development of Definition of IT Vision & Strategies

Validation & Adjustment

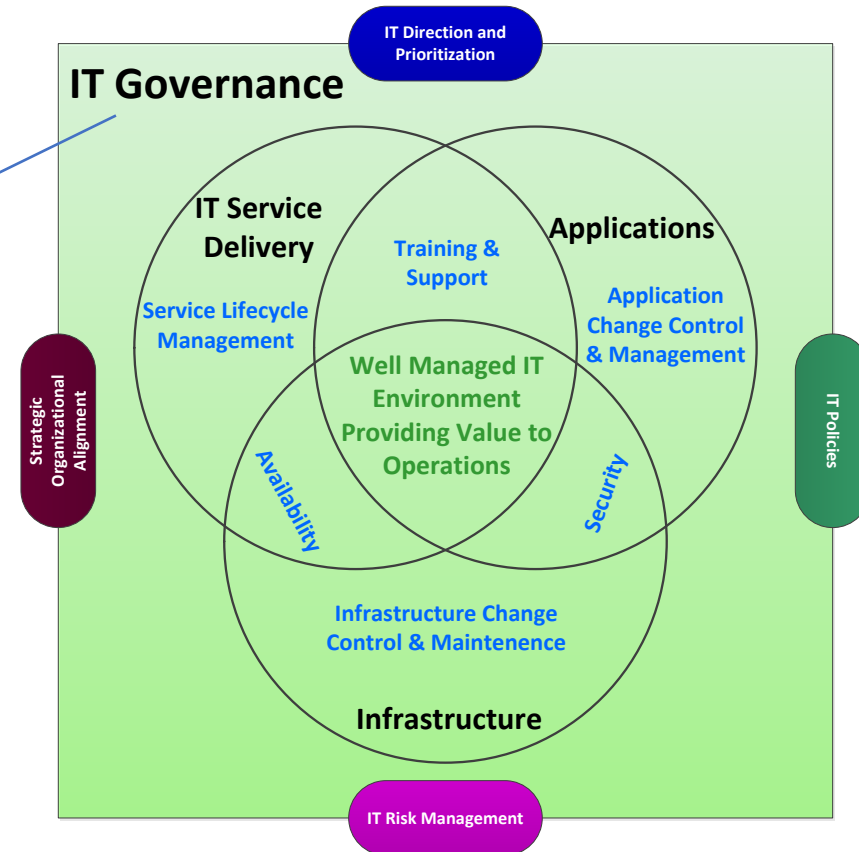| Gathering of Facts	Performance of a SWOT Analysis	Examining of Facts and SWOT Analysis	Development of Definition of IT Vision & Strategies	Validation & Adjustment

- Input from all Stakeholders
- Broad spectrum input from internal (and where appropriate external) IT customers
- IT performance metrics
- Existing IT skill sets and needed IT skill sets
- Discovery (as is status) related to the four key elements that always exist in well managed IT environments:
  - IT Governance
  - Service Delivery
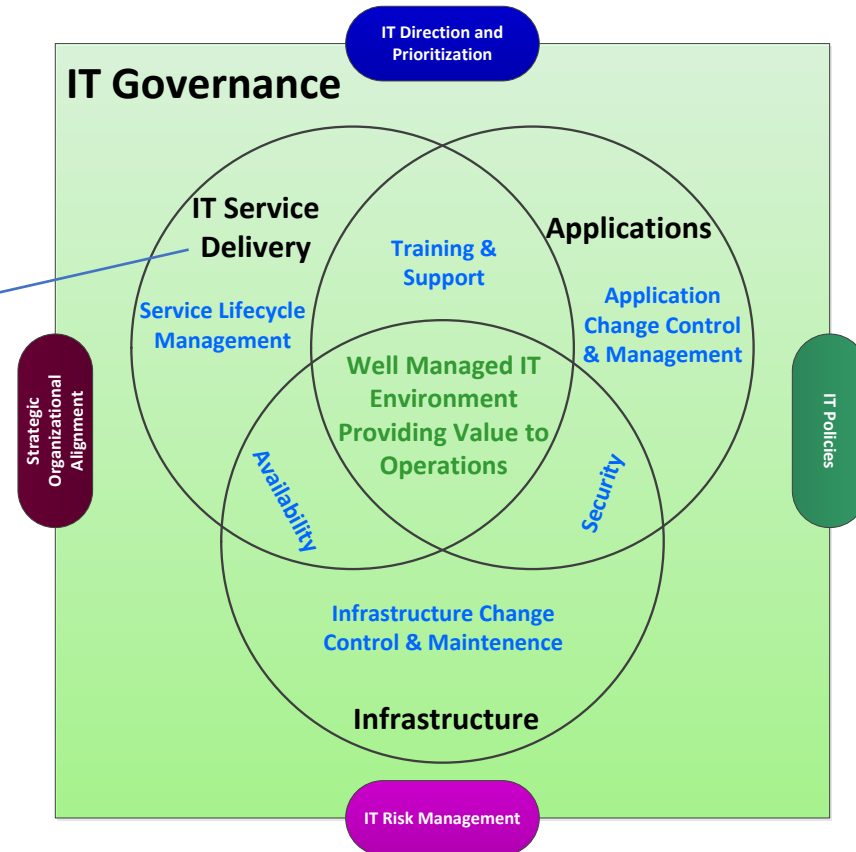 - Applications
  - Infrastructure

ICMA

Four Key Elements Existing in Well Managed IT Environments

- Oversight of the entity's IT direction and prioritization.
- Assurance of IT's strategic alignment with the overall entity's strategic direction.
- Approval of the entity's IT risk objectives and resulting posture.
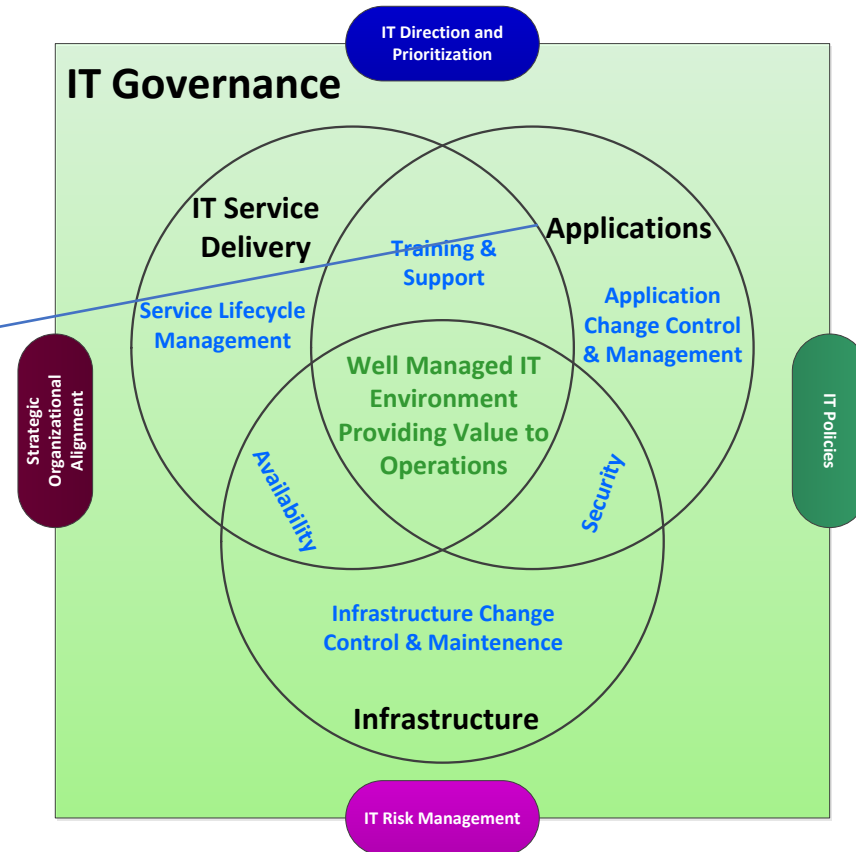- Authorization of the policies that support the IT risk objectives.

Four Key Elements Existing in Well Managed IT Environments

IT organizational structure, staffing, policies and implemented work instructions.
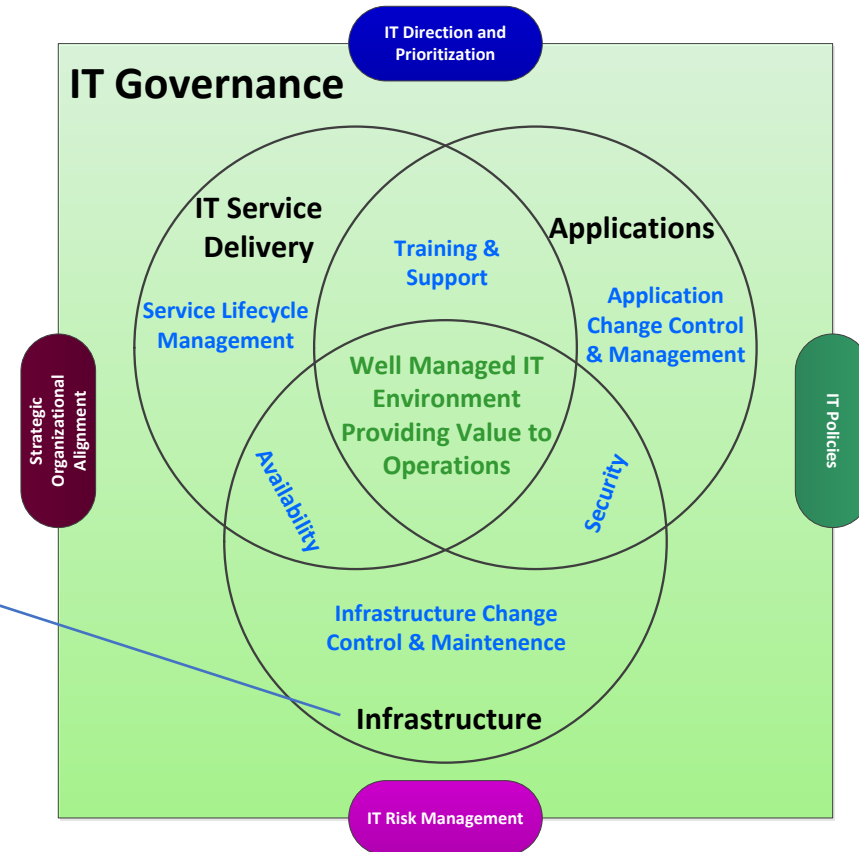

IT Governance

IT Direction and Prioritization

Strategic Organizational Alignment

IT Policies

IT Risk Management

IT Service Delivery

Applications

Training & Support

Service Lifecycle Management

Application Change Control & Management

Well Managed IT Environment Providing Value to Operations

Availability

Security

Infrastructure Change Control & Maintenence

Infrastructure

ICMA

Four Key Elements Existing in Well Managed IT Environments

Programs used to support the entity's business operations and functions.

Four Key Elements Existing in Well Managed IT Environments

Fundamental systems comprising the networks and hardware components deployed and managed to support the applications.

IT Direction and Prioritization

IT Governance

IT Service Delivery

Applications

Training & Support

Service Lifecycle Management

Application Change Control & Management

Strategic Organizational Alignment

Well Managed IT Environment Providing Value to Operations

IT Policies

Availability

Security

Infrastructure Change Control & Maintenence

Infrastructure

IT Risk Management

ICMA

- External analysis
  - Opportunities
  - Threats
- Internal analysis
  - Strengths
  - Weaknesses
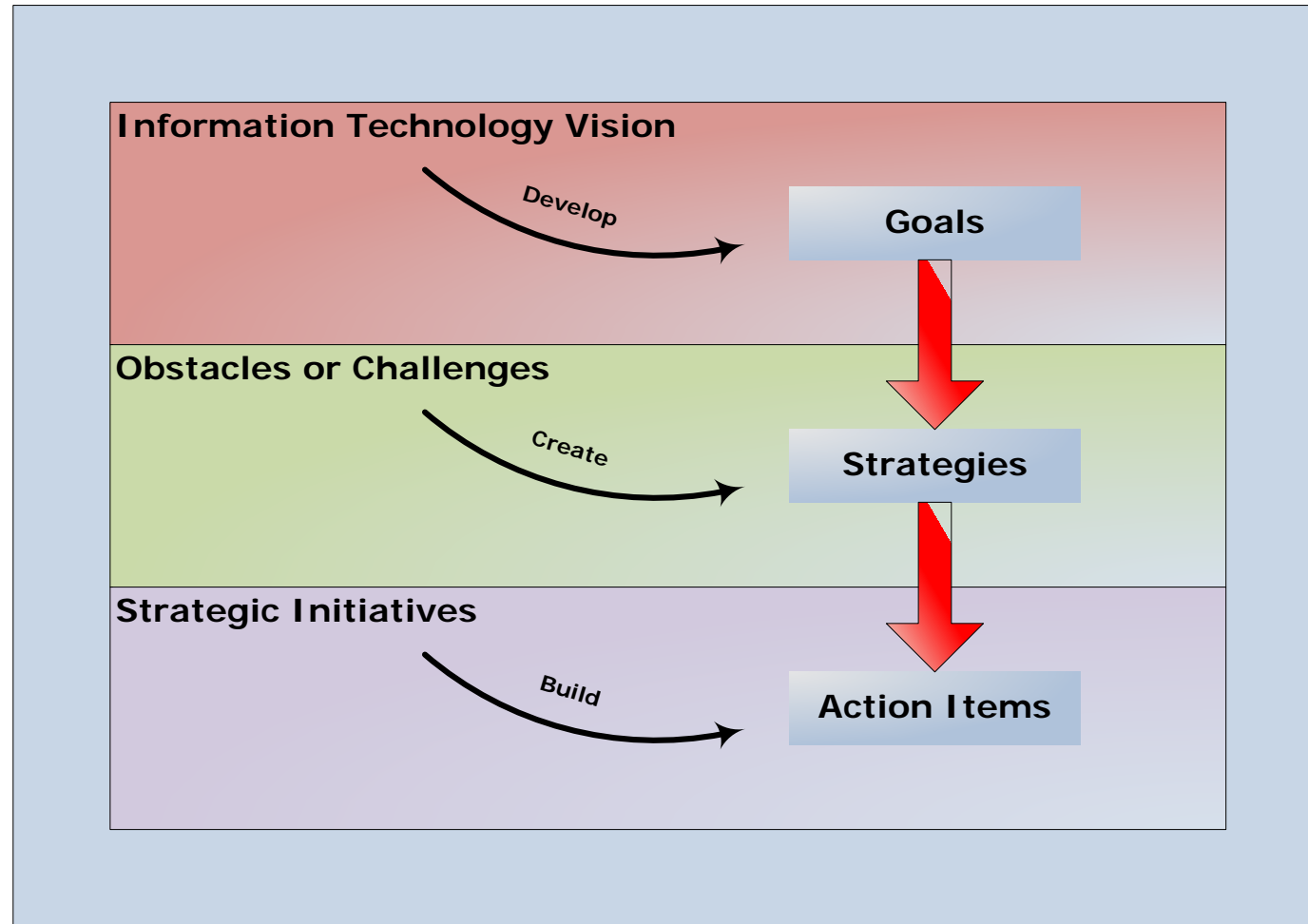- Strategic questions
- Strategic issues

- Review of the inputs received
- Results of the SWOT Analysis
- Define key statements and facts
- Consider the potential user adoption
- Consider 'Networked governance' – Concept of Government 2.0 "Use of IT to socialize and commoditize government services, processes and data." (Gartner Definition)

- Development of an IT vision for the organization based on facts.
- Consideration of SWOT challenges to the vision.
- Development of initiatives to overcome challenges.
- Development of action items to form basis for the IT Strategic Plan.

IT Strategic Plan Development

- Stakeholder and management review of:
  - Vision
  - Mission
  - Goals
  - Strategies
  - Action Items
- Make adjustments where necessary.

ICMA conference

BALTIMORE 2018
104th Annual Conference
SEPTEMBER 23–26

Questions/Comments?

Contact Jeff Locketz
Jlocketz@LurieLLP.com
612-381-8830

#ICMA2018